



ASSIGN WORKLOAD

CEFMS Interface



1) CEFMS generates a Purchase Request (PR) complete with line items, requirements, and funding authorization at scheduled interface times.

2) CEFMS pushes the PR into the PD² Database.

PD² Database



1) PR comes into PD². It arrives into the Team Leader (TL) or Designated Representative's (DR) Inbox based on a CEFMS generated buyer ID.

2) A TL or DR **workload assigns** the PR to a USER.

3) *Modifications should not be workload assigned.*



- Once PR package has been **workload assigned**, Blue Folder is created and the PALT Clock Starts.

User's Inbox



1) USER receives in the Inbox a Blue folder that houses the PR package.

2) USER then drags the assigned PR package from the Inbox to the *Active* cabinet.

3) USER opens *Active* cabinet and renames the blue folder the same as the CEFMS generated PR+C number.



S.O.Ps & USER INSTRUCTIONS



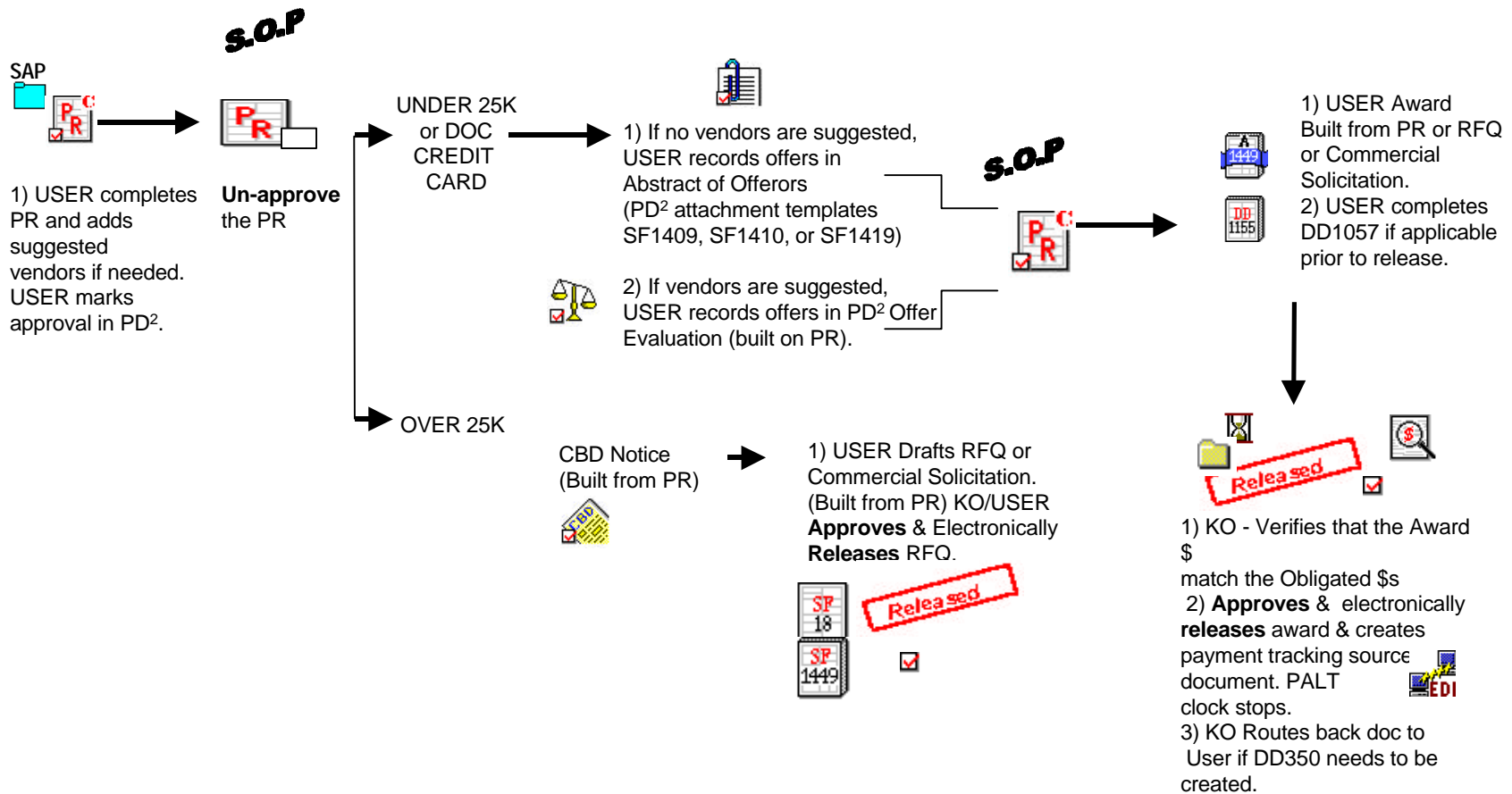
S.O.Ps:

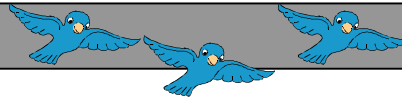
- The PR should remain un-approved when possible in order for CEFMS to modify the existing PR.

S.O.Ps:

- Users will have one *Active* cabinet on their desktop in which all current work is done.

S A P (1 of 2)





S A P (2 of 2)



S.O.P

S.O.Ps & USER INSTRUCTIONS

S.O.Ps:

•ADUDAR:

Approve PR temporarily.

Open **Document**.

UN-approve PR.

Complete **Document**.

Approve PR again.

Release document.

If a new vendor needs to be added,
user needs to **un-approve** PR,
add new vendor, and then **re-approve** PR.

•*New Vendors* cannot be added to PD² Vendor tables
without TIN,CAGE, CCR OR DUNS.

•Check <http://ccr.edi.disa.mil> for valid code.

•NOTE: TIN AND CCR ARE NOT APPLICABLE FOR
FOREIGN VENDORS (SEE SECTION 2.2).

S.O.Ps:

For EDI

•User highlights approved and released document.

•Select Procurement.

•EDI Transmit.

•Select Original, Accept/Reject required, and the necessary
transaction type (s).

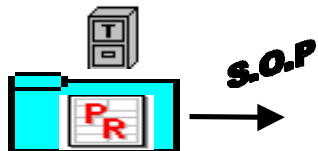
•Click OK.

•To complete transmission notify SA to transmit.

SOLICITATION (1 of 2)

SOLICITATION
(RFP, IFB, & COMMERCIAL,)

User's Active
Cabinet



1) The USER temporarily **approves** the PR in order to begin the Solicitation.

2) **Un-approve** PR after opening and saving the Solicitation.

3) Create the CBD using the Solicitation number.

4) Return to the Solicitation for completion.



Use Solicitation Mailing List (built on PR) to send Solicitation.



CBD Pre-Solicitation Notice
(built from SF33)

Special notice for Draft
RFP (built on SF33)

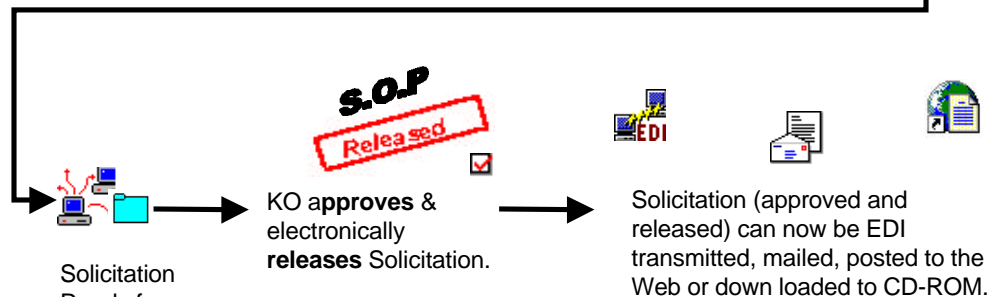
CBD Source sought
(built from PR)



IOQ
(Built from SF33)



Commercial
Solicitation
(built from PR)



Solicitation
Ready for
Approval.

KO **approves & electronically releases** Solicitation.

Solicitation (approved and released) can now be EDI transmitted, mailed, posted to the Web or down loaded to CD-ROM.



Re-approve
the PR



Un-approve the PR
after the release of the Solicitation.



SOLICITATION (2 of 2)

S.O.P S.O.Ps & USER INSTRUCTIONS



S.O.Ps:

Creating a CBD in PD²: Select Prepare Menu Option. Save to CBD Transmit Directory. Establish a shared location where the CBD can be saved.

- Refresh clauses:* Users shall hit **refresh** button on Clauses tab before **release** of the Solicitation in PD² to bring in the most current clause updates from the FAR.

- The Use of CBDnet* is also an authorized means of distribution. CBD will then be FTP out to CBDnet.

- SGGAR-** The process for Solicitations and Amendments:

Save document.

Generate CLINs.

Generate Section J.

Generate document.

Approve.

Release.

- ADUDAR:**

Approve PR temporarily.

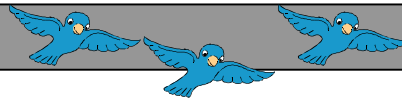
Open **Document**.

UN-approve PR.

Complete **Document**.

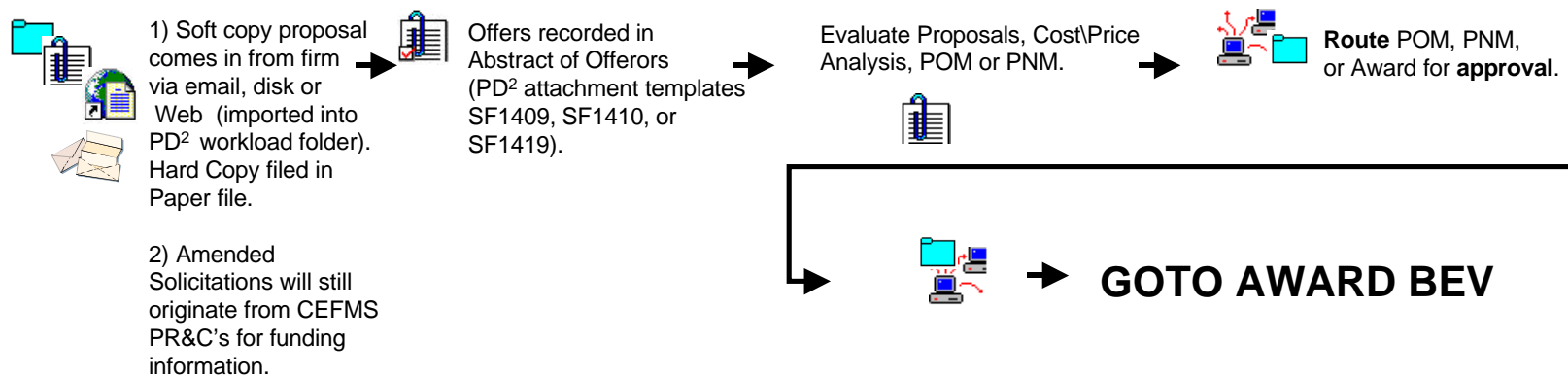
Approve PR again.

Release document.

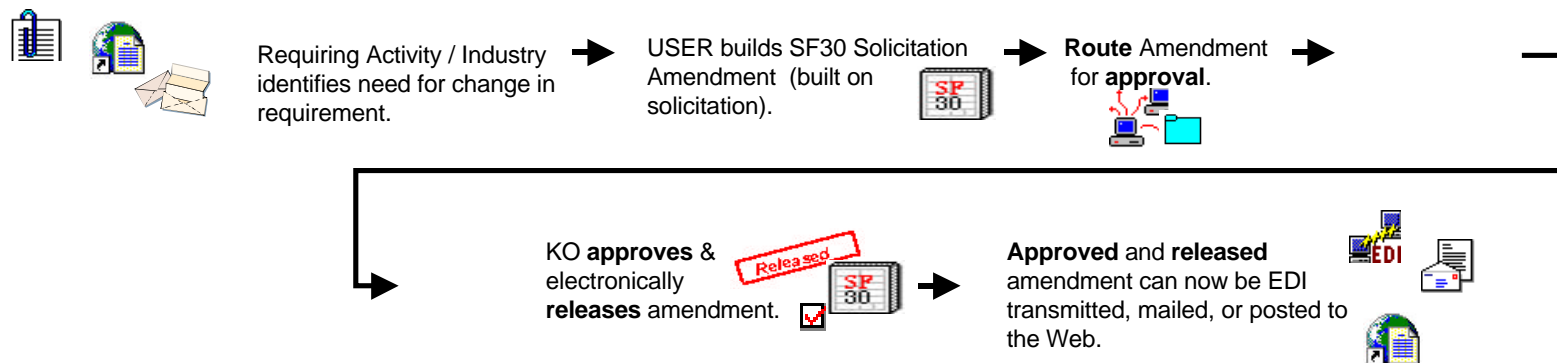


AMENDMENT/EVALUATION

EVALUATE PROPOSALS



AMEND SOLICITATION



AWARD

AWARD PHASE



DD1155 SAP
Purchase Order/
Delivery Order
External SF26
(Pre-existing Awards)

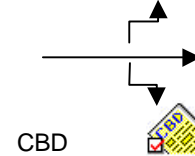


See Section 2.44
for A-E contract
SF26 for All Large
Purchase,
BOA, & IDIQ
SF1449, SF 1442, All
Commercial Awards

User builds External SF26 stand alone.
All others award documents are built from SF33 and SF1449
Solicitation documents, or Direct award documents
from PR, SF 1442, Letter, Visa, ABG3.



Award Associated
Attachments



CBD
Announcement
(built on Award)

Route for Review
and Approval



1) KO Verifies Award \$s
match Obligated \$s,
Grants Approval,
2) **Routes it** back to User
for completion of DD
1057 feeder sheet (if
appropriate) or...



1) Re-approve
the PR

Released



1) KO **releases**
award.
2) **Routes** back to
User.
PALT clock stops.



1) User completes DD50,
routes it back to KO
for approval.



Approved and
released award EDI
transmitted / web /
mailed.



S.O.Ps & USER INSTRUCTIONS

INSTRUCTION:

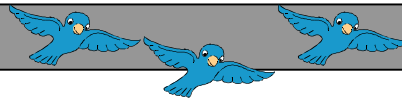
- User must complete DD1057 Feeder sheet prior to release.
- DD 350 report after release.
- Cut & Paste the extended description into/from MS Word when using IDIQ (basic "D" contracts).

S.O.Ps:

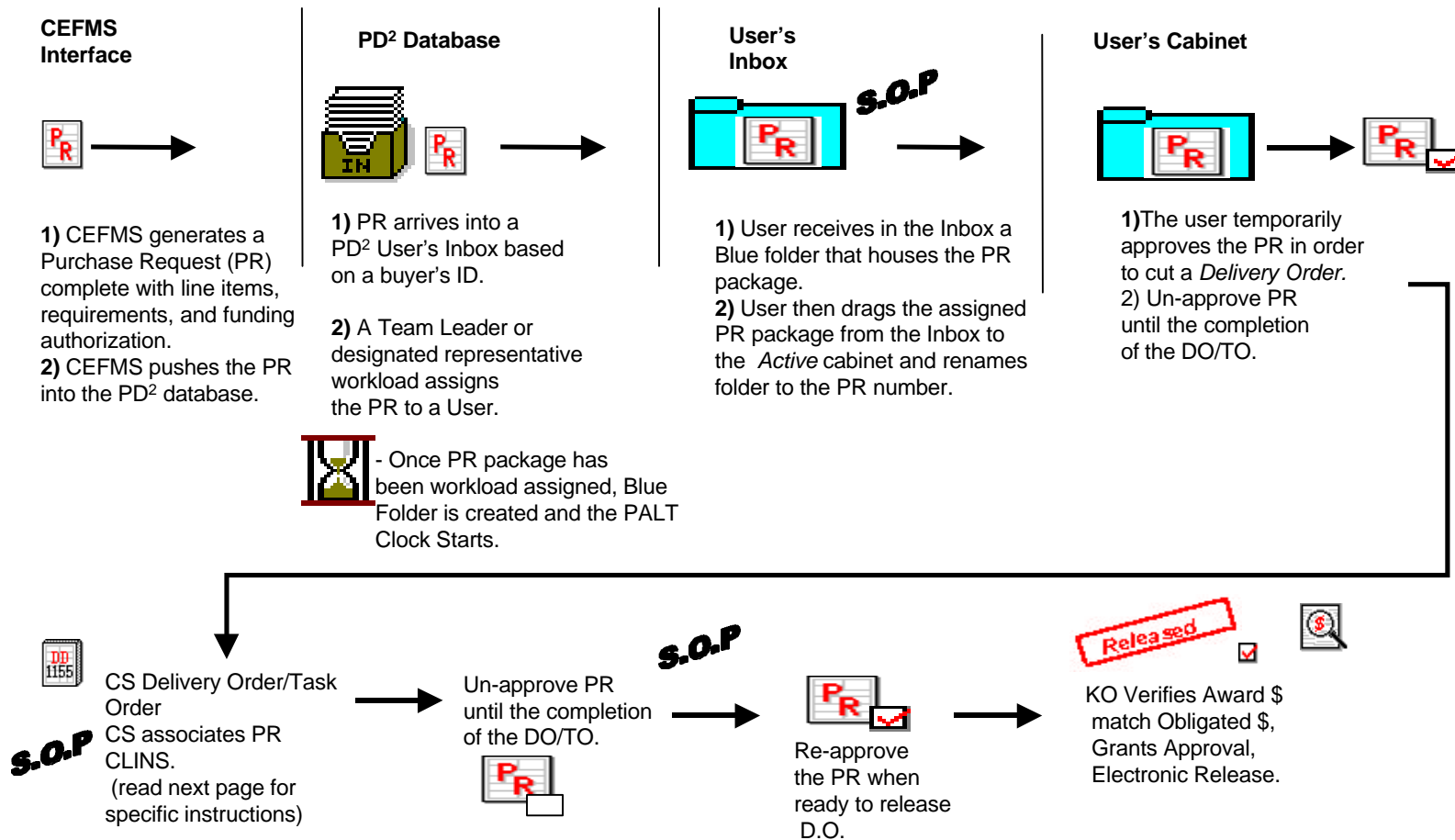
- ADUDAR:**
Approve PR temporarily.
Open **Document**.
UN-approve PR.
Complete **Document**.
Approve PR again.
Release document.

S.O.Ps:

- Refresh clauses:** Users shall hit refresh key on clauses tab before release of solicitation in PD² to bring in most current clause updates from the FAR.
- New Vendors** cannot be added to PD² Vendor tables without CAGE, CCR, TIN and DUNS. Check <http://ccr.edi.disa.mil> for valid code.



DELIVERY/TASK ORDERS (1 of 2)



Once PR package has been workload assigned, Blue Folder is created and the PALT Clock Starts.



DELIVERY/TASK ORDERS (2 of 2)



S.O.Ps & USER INSTRUCTIONS



S.O.Ps:

- User highlights the PR and selects DD1155 DO/TO. A “match” screen will appear with the PR on one side and the AWARD on the other. Next - select Attach button and search for and select the base contract. Match the CLINs from the PR and DO by clicking on the CLINs on both the PR and DO match screen. An = sign will appear in the middle which indicates that the CLINs are attached. From this point - continue completing the DO.

- ADUDAR

- CGGGAR** (Contracts and Modifications):

Certify Funds.

Generate CLINs.

Generate Section J.

Generate document

Approve.

Release.

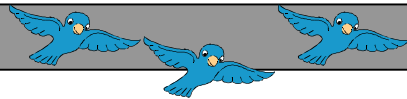
- Cut & Paste the extended description when using IDIQ (basic “D” contracts).

INSTRUCTIONS:

- CS should check that newly attached CLIN is properly funded.

- EDI directions located in the SAP BEV.

- USER creates DD1057 Prior to release and DD350 After release of the DO/PO.



FUNDED MODIFICATION (1 of 2)

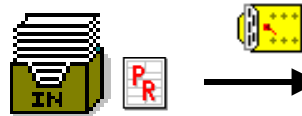
MODIFICATION PHASE

CEFMS Interface



- 1) CEFMS generates a Purchase Request (PR) complete with line items, requirements, and funding authorization.
- 2) CEFMS pushes the PR into the PD² database.
(Alert message is sent to CEFMS buyerid for original PR&C)

PD² Database



- 1) PR comes into PD². It arrives into the Team Leader (TL) or Designated Representative's (DR) Inbox based on a buyer's ID.
- 2) *The modification should not be workload assigned.*
- 3) TL or DR routes PR to the User.

S.O.P



- 1) User keys the PR number into the Reason for Modification block 14 and attaches PR CLINS (if necessary).
- 2) User Prepares Mod built from Award.

CS Prepares 1057 Feeder Report (if appropriate).



CS flags Mod: Unilateral or Bilateral.

KO **approves** the SF30, electronic release, completes DD350.



S.O.Ps & USER INSTRUCTIONS

S.O.Ps:

Remember to **save** prior to **generation**, and **generate** prior to **approval**.

INSTRUCTIONS:

CS should check that newly attached CLIN is properly funded, from CEFMS.

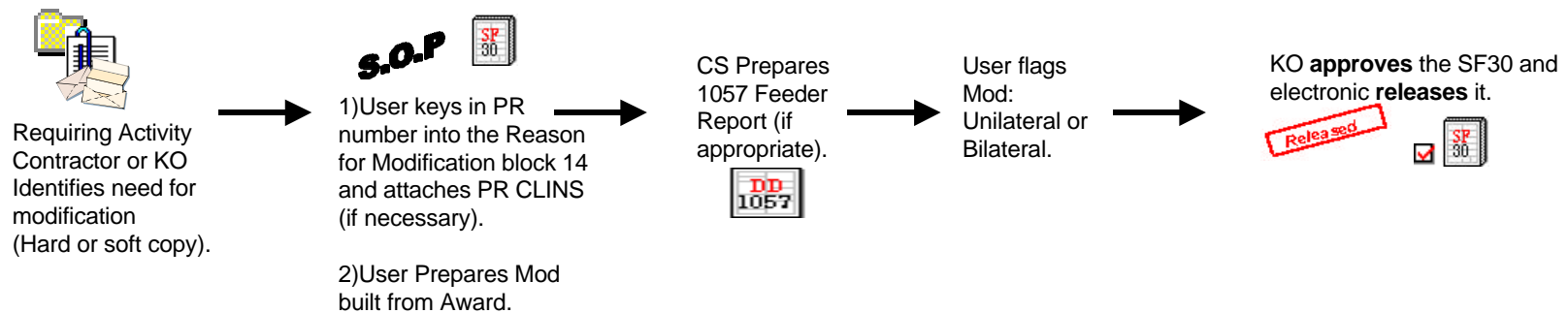
Mods created outside PCO office are A### Mods. Mods created inside PCO office are P000 Mods.

CS completes DD350, KO approves DD350.



NON - FUNDED M O D I F I C A T I O N (2 of 2)

MODIFICATION PHASE



S.O.P.s & USER INSTRUCTIONS

INSTRUCTIONS:

Remember to **save** prior to **generation**, and **generate** prior to **approval**.

Planning PRs follow normal PR process.